



Diet Coke can designs consumers won't see - Page M-4

Top 10 ad agency research units - Page M-11

Advertising Age

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October 18, 1982

NBC turning the corner?

Series numbers high | Agencies impressed

By JAMES P. FORKAN

By DIANE MERMIGAS

NEW YORK—NBC is thriving on baseball fever. The World Series, called "the Six-Pack Series" since the teams are from Milwaukee (Miller and Pabst) and St. Louis (Anheuser-Busch), started well for the perennially third-place network, surprisingly so for those people used to saying that it takes a New York-California series to add luster to the ratings.

NBC estimated that the first game, on Oct. 12, was seen, totally or partially, by 61 million people, giving NBC the night with a 27 rating vs. ABC's 19.4 and CBS' 13.4. That was good news for Miller, the solo NBC World Series beer advertiser (AA, March 29), just as it was on ABC's playoffs; A-B in recent years has opted for local-team broadcast sponsorships.

The overnights for the second game showed Chicago, not surprisingly, averaging a 45 share compared with a 40 in New York; last year, of course, New York interest was higher, given the Yankees-Dodgers pairing. But Los Angeles posted a 51 share for the second game this year.

Nationally, the series' Game 2 grew to a 29.1 rating and 45 share (higher than last fall's second game, on ABC) to give NBC its second nightly victory in the new season. ABC ran a distant second that night, with the tv movie "Having It All" performing best at 17.1 and 26; "Gold Monkey" fell behind CBS' "Seven

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CHICAGO—NBC's prime time appeal in big cities in the early weeks of the new tv season could signal a shift in network demographics from rural to urban viewers, a shift like the one that launched ABC's meteoric climb out of the ratings cellar a decade ago.

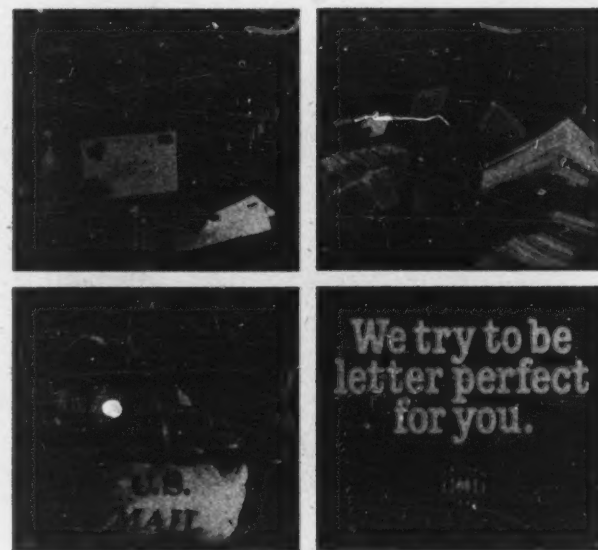
"I think it's a result of NBC making a concerted effort this season to offer us many more adult, sophisticated, higher-quality series like 'Fame,' 'Hill Street Blues,' 'Cheers' and 'Remington Steele,'" said Kay Durkin, director of network broadcasting, Ogilvy & Mather here.

"I think NBC is being more adventuresome in its programing and taking more chances. They have been very clever in their promotion of series. In all, they're taking the kind of approach that appeals more to viewers in big cities," she said.

That's just one of many observations made by media executives at the nation's top advertising agencies based on the first several weeks of the new network season. Nearly every media executive polled by Advertising Age had something encouraging to say about NBC's programing efforts and prospects for advancement this season, even though the peacock network continues to trail the competition in national Nielsen ratings.

However, they all agreed it still is too early in the

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Sending a message

American Postal Workers Union is using a tv campaign to "show America the dedication and integrity" of postal workers. Moving everything from valentines to packages is done more efficiently than in any other country, the spots say. Agency is J. Walter Thompson USA, Washington. (See story on Page 80.)

Everybody gains in battle of the burgers

By RICHARD KREISMAN

Three weeks after launching its controversial advertising campaign, Burger King says its sales are up 4% to 5% over last year, a figure similar to the gain the chain made this summer. The campaign's targets—McDonald's and Wendy's—also show sales gains since the campaign broke in late September.

"Our sales were up last week and the prior week," said a spokesman for Wendy's, which has filed a \$25 million suit against Burger King for punitive damages from the campaign. "I suppose it'll be harder to prove that the campaign has been directly damaging, because our sales are better than ever."

McDonald's sources said the chain's over-all sales have been up slightly in the past few weeks. That's in the face of the Burger King campaign and a spate of bad publicity after members of the Center for Disease Control reported that McDonald's products were linked to an intestinal illness in a few isolated incidents.

Kyle Craig, Burger King senior vp-marketing, last week said, "It's too early to tell whether we will experience substantial incremental growth from the campaign. We do know that the advertising and all of the publicity has brought an unprecedented amount of interest in the hamburger business."

Mr. Craig said the Miami chain has "a couple of other" comparative spots waiting in the wings.

On the legal front, McDonald's Corp. and Wendy's International attorneys continued to take depositions concerning the Burger King campaign and the chain's supporting research. But at press time, no further court actions had been taken to stop the Burger King spots.

New packaging due in January

Tylenol competitors boom

By NANCY GIGES

As Johnson & Johnson begins its rebuilding program for Tylenol, sales of competing analgesics are booming, according to buyers across the country. Bristol-Myers and American Home Products already are back-ordered for their nonaspirin products, Datril and Anacin-3, respectively.

Fear that the Tylenol poisonings in the Chicago area (AA, Oct. 4, et seq.) might provoke a wave of drug tampering episodes across the country spread last week when a Colorado man suffered eye burns after using a bottle of Pfizer's Visine AC eyedrops that had been contaminated with acid. Authorities determined the incident was limited to one store where two bottles were found to have been crudely tampered with.

Although one local official called for a nationwide recall, Pfizer said there was no need for a recall and urged purchasers to make sure that the antitamper seals on Visine bottles were intact. The company also is considering running consumer advertising with a similar message.

The company that has suffered most, J&J's McNeil Consumer Products Co., which markets Tylenol, declined to confirm reports that it would resume some tv advertising this month.

J&J continues to say it has no details on when Tylenol advertising will resume. One source said

the company was contemplating advertising to reassure consumers that the company's manufacturing process was not involved in the tragedy, to say that tamper-resistant packaging was on the way and to stress the J&J heritage of safe products.

J&J stopped all advertising for Tylenol Oct. 1 as soon as it received word of the first poisonings.

Last week, the company ran a one-time newspaper ad in 300

major markets (excluding Chicago, where all Tylenol products are off the shelves) to advise consumers on how to exchange their Tylenol capsules for tablets or a refund. Tylenol capsules were withdrawn temporarily from the national marketplace as word of the seven deaths appeared. The all-copy Tylenol ad gave consumers alternatives for a replacement, either via mail or from a retailer. The

(Continued on Page 82)

last minute news

Liggett plans ad campaign for generic cigaret

DURHAM, N.C.—Liggett & Myers Tobacco is expected to break an advertising campaign for its generic cigaret brand late this year or early next year, according to a reliable source. Selling for roughly \$1 less a carton than branded cigalets, the generics have been a boon to the company and have grabbed about 1% of the U.S. market. Bloom Advertising, Dallas, is expected to handle.

Grey gains bulk of \$25 million Beecham move

NEW YORK—Beecham Group, having completed its acquisition of J. B. Williams Co. from Nabisco Brands (AA, Sept. 20), has moved between \$25 million and \$30 million in spending from Williams' house agency, Parkson Advertising, and Chestnut Advertising. A Beecham agency, Grey, gets the lion's share: Geritol, Aqua Velva, Lectric Shave, Vivarin, Rose Milk lotion, Femiron, Deep Down, Acu-Test, PVM appetite suppressant, Serutan laxative, Mega vitamins, Vitabank and new Popeye chewable vitamins. Cunningham & Walsh, also a Beecham agency, gets the \$3 million Somnexam account. Parkson retains Nabisco spending; Chestnut yields creative for Geritol, Somnexam and Popeye.

(Continued on Page 8)

Net schedules loose as NFL talks

By JAMES P. FORKAN

NEW YORK—Amid some promising signs of a National Football League strike settlement, the tv networks have begun edging away from their initial strike replacement programming.

At NBC, sports president Arthur Watson has shelved Canadian Football League coverage for at least two weekends. NBC spokesmen emphasized that no CFL decision has yet been made beyond that. Other industry sources said that NBC undoubtedly is hoping that the NFL strike will have been resolved by then, now that both sides are working with an impartial mediator.

NBC has not penciled in its CFL substitutes for Oct. 24, but on Oct. 17 it carried live the Charlotte 500

auto race coverage, a gymnastics event and boxing, all following the usual "NFL Today."

At ABC, there are some hints that its programmers might not go with movies alone to fill in for Monday night football during November. In advisories to affiliates and the tv press, ABC has taken to referring to "alternate programming" being under consideration for at least some of those Monday nights. In past weeks, ABC has indicated "Monday Night Movies" would be the tentative replacement. In its first move away from movies as NFL subs, ABC went with "Monday Night Football Superstars" for Oct. 18 (AA, Oct. 11). Although the NFL has warned the players due on that "Superstars" special that they, like the Turner all-stars, would be violating their

league contracts, the league indicated it would not press the point in the courts.

Now that the NFL has apparently relented and will no longer try to legally block the NFLPA from playing in the Turner league or in ABC's "Superstars," some sources have begun

NFL broadcast sponsors hold off on switch to print. Page 78.

speculating that further erosion of the NFL contract's Section III may occur, e.g., by those interested in the new spring-summer United States Football League.

To replace its next scheduled non-Monday NFL telecast, due in Oct. 24 prime time, ABC said it will revert to a Sunday movie.

CBS on Oct. 17 inserted a boxing/billiards package bought from Top Rank and Claridge Hotel & Casino, Atlantic City. J. Gerald Nagler, senior vp, Lewis & Gilman, Philadelphia-based ad and agency for the Claridge, said the package, arranged "at the 11th hour" late last week, called for four 10-round bouts live as of 1 p.m. (ET), then the taped billiards competition featuring Willie Mosconi and Minnesota Fats.

Now that the two sides in the NFL dispute have been working with a mediator, 73-year-old San Francisco lawyer Sam Kagel, and have agreed to a news blackout on the bargaining, industry sources seem more optimistic about a quick settlement, perhaps even in time to resume play late this month.

One tv sports expert leaning to-

ward optimism, Steve Leff, exec vp, Backer & Spielvogel, sees the presence of a mediator as possibly leading to a settlement before the end of this week. Nevertheless, Mr. Leff expressed some concern about perceptions of pro football on the part of both the fans and the media. Although he has not yet seen strong evidence of such "negative ruboff," were the fans to prove extremely irate at the players, pro football's usefulness as a media buy might be sharply diluted, he added.

In the unlikely event that the NFL canceled the 1982 season entirely, Mr. Leff warned, the view of the fans might be an even more important consideration.

Neal Pilson, CBS Sports president, is among those hopeful that
(Continued on Page 78)



Objective for '83: More Peppers

Current "Peppers" urge others to "try it, try it, try it" in Dr Pepper Co.'s 1983 tv commercials (AA, Oct. 4), a campaign the company says will be local in nature as opposed to its previous heavy emphasis on network tv. In these scenes, new triers proclaim "Dr Pepper made a Pepper out of me." That theme will replace the current dance-filled "Be a Pepper" theme. Agency for the Dallas-based company is Young & Rubicam, New York.

New RJR brands alight at Ted Bates

By JOHN J. O'CONNOR

NEW YORK—Ted Bates Advertising/New York, former creative agency for Brown & Williamson's Kool and Viceroy brands, is back in the cigaret agency ranks, thanks to an accelerated new brand course taken by R.J. Reynolds Tobacco.

The RJR assignment to Bates actually is one of five new brand development projects that RJR has parceled out. The others have gone to agencies already on the Reynolds roster, namely the Bates-owned William Esty Co.; Leber Katz Partners; BBDO, all based here, and Tatham-Laird & Kudner, Chicago.

According to a source, Bates got the nod from RJR not only on the basis of its past track record as a

B&W shop, but also because Bates acquired Esty, the agency for Winston and Salem cigarets. On top of that, RJR is said to be impressed with Larry Light, Bates exec vp-client services, who previously was exec vp-director of marketing, media and business development at BBDO, agency for RJR's Camel cigarets.

The surge of new product development within the industry stems from the fact that cigaret companies have nearly exhausted line extensions for their brands. Therefore, totally new brands with special characteristics appealing to specific segments of the smoking population are much in need for the years ahead.

Philip Morris U.S.A. has gotten a
(Continued on Page 81)

highlights

Monday, October 18, 1982

Computerland, one of the nation's largest computer retailing chains, is ready to move into the home market. See Page 10.

Time Inc. marketing executives are giving rave reviews to a new report on household income they say provides marketers with unique data. See Page 14.

The projected 1983 ad budget for the new Care Bears line of licensed characters from American Greetings and General Mills has jumped to \$7.5 million. See Page 16.

Following F.H. Hayhurst's linkup with Saatchi & Saatchi Compton Worldwide, British Airways awarded the shop its \$2 million Canadian account. See Page 16.

A comparison of the latest figures from Simmons Market Research Bureau and Mediamark Research shows two widely divergent sets of data on magazine readership. See Page 24.

Access, a new catalog that focuses on life-style marketing, is being mailed to 250,000 direct-mail customers. See Page 34.

Two companies have been fighting for control of what has evolved into the airline ticket-jacket advertising market. See Page 35.

The bare-breasted blond dec-

orating bottles of Nude Beer has kept the California Department of Alcoholic Beverage Control and the U.S. Bureau of Alcohol, Tobacco & Firearms from approving the label. See Page 38.

Mutual Broadcasting System has numerous new radio programs under development, many made possible by its "multicasting" satellite distribution capabilities. See Page 40.

Chrysler Corp. will start aiming more money toward cable tv to avoid advertising waste on the networks. See Page 74.

PeopleExpress Airlines and Larry Plapler leave Levine, Huntley agency as Plapler & Associates hangs out its shingle. See Page 76.

CORPORATE CLOSEUP

G. Heileman Brewing Co.'s quest for expansion from its mid-western base into the beer-thirsty Sunbelt will have to come in the form of strategically located breweries. See Page 4.

VIDEOTECH

Car companies are beginning to take a serious look at cable, and their ad frequency on the medium is growing. See Page 60.

INTERNATIONAL

The U.K. is gearing up for what is expected to be its largest merchandising operation ever—the selling of "E.T." See Page 32.

Germany plans to relax its tough policy on cable tv in order to permit the early construction of private cable networks. See Page 32.

Japan's state-run tobacco monopoly is preparing to meet the challenge posed by U.S. cigarets with a Western-style ad approach for its domestic brands. See Page 50.

If Quaker Oats' purchase of Ralston Purina's European pet food operations goes through some time this year, the dominant European pet food marketer—Mars Inc.—will be facing its first formidable market competitor. See Page 73.

By the end of 1984, Kraft Inc. plans to reduce its European production plants, personnel and products. See Page 73.

MAGAZINE

After seeing 150 different package designs, the marketers of Diet Coke chose one that they hoped would carry on the Coca-Cola tradition yet be distinct enough to stand on its own. See Page M-4.

Market/Advertising Research: A number of major ad agencies have large in-house staffs of professionals whose job it is to research their client's marketplace potential. See Page M-9.

Campbell-Ewald executive Tom Adams, in Bart Cummings' Benevolent Dictators interview, covers a lifetime of work, exclusively for one agency. See Page M-46.

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Chrysler holds up on BBDO

By RALPH GRAY

DETROIT—Now that Chrysler Corp. brass have selected BBDO as agency for the \$100 million Dodge car and truck account, the agony has begun. When will Chrysler make it official?

It didn't happen last week as scheduled. Negotiations with BBDO and internal review continue at an "inexorable" pace, a Chrysler exec said.

One reason for the delay may be Chrysler's desire to have its internal marketing staff reorganized first. Joseph Campana, new vp-marketing, is setting up separate Dodge and Chrysler-Plymouth marketing staffs. It is believed the staff changes will be announced prior to the BBDO announcement. But the more the delay, the worse for Kenyon & Eckhardt, Birmingham, Mich., which will give up the Dodge account while keeping the Chrysler-Plymouth and corporate portions. It's hard to hold admen who may be cut.

It's also making it harder for BBDO to step into K&E's shoes with Dodge dealer groups who may opt for local agencies in the interim. And those agency execs who've been contacted for hiring by BBDO on an "if-come" basis
(Continued on Page 81)

'Time' promoting household income report

By **STUART J. ELLIOTT**

New York—Hailing a new report on household income, *Time* marketing executives use superlatives usually reserved for the magazine's cover stories on hit movies.

"It's a valuable marketing tool not available in other places," said Dave Borie, director of marketing development. "This comes as close as anything can to representing the real world out there."

The report, prepared by the Consumer Research Center of the

Conference Board, was sponsored by *Time*.

The report is based on income information that had been collected by the U.S. Bureau of the Census. Details are to be released this week.

According to the executives, the report is unusual in several respects, including:

- Classification of data by two age cycles. In addition to the usual U.S. government breakouts (younger

than 30, 30 to 39, 40 to 49, etc.), there also are those used most by marketers (younger than 25, 25 to 34, 35 to 44; see chart). "For the first time, the breaks are the same as are extant in our industry," Mr. Borie said.

- Ability "to switch from households to people and back," said Jack Stradal, *Time* marketing supervisor. Most government data are reported by households, while marketers usually use per-person

figures.

- Accuracy of the data, since they are based on actual census information, compared with the vagaries of syndicated research.

- The report "is not intimidating," said Mr. Stradal, since it's a 28-page booklet, rather than the usual "2-in.-thick book with which you spend all your time going through the index."

Time sponsored the report, said Mal Ochs, director-marketing in-

formation, because, "If we can get enough people to know these data exist, [they'll see] a good reason for selective marketing."

The magazine is a big booster of that type of selling, as its readers are upscale in income and education. It makes extensive use of special demographic editions to, in the words of Mr. Ochs, "sell where the market is."

The report notes there is "a marked polarization in the distribution of the nation's income. More than 42% of all households have annual earnings of less than \$15,000 and they account for 16% of the total income flow to consumers. Conversely, homes with more than \$35,000 of earnings constitute only 15.5% of all households but account for 37% of all income."

Or, as Mr. Ochs put it, "Clearly, you've got to get up there to get the money."

And in terms of education, the Conference Board report states, households headed by a college graduate "account for 18.5% of the population but for 28.5% of the total money available to consumers. Those who failed to complete high school represent about 31% of all homes but have only 20% of total income."

Mr. Borie hopes the report will help debunk some of what he considers to be myths of marketing, "the first of which is that income distribution has changed over time, from a social point of view everybody is 'muddling out.' But that isn't true."

Another myth is the belief there are more persons per household at lower income levels, Mr. Borie said. The report shows the opposite: In households with income less than \$5,000, there are 1.76 persons. That figure rises with income, peaking at 3.57 in households with incomes of \$50,000 and up.

Time's marketing executives await updates of the report's data, due next year, which will address issues such as household expenditure patterns.

Mr. Ochs believes future reports will reveal spending differences between a household with two wage earners, each making \$20,000 a year, and one with a single wage earner making \$40,000 a year.

The report will be distributed to *Time's* sales force worldwide, the executive said, and it will be used in presentations and other projects.

Copies of the report are available from: Consumer Research Center, The Conference Board, 845 Third Ave., 10022.

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Income by age of household head

	Under 25	25-34	35-44	45-54	55-64	Over 64
Households (in millions)	6.4	19.2	14.5	12.7	12.7	16.9
Persons per household	2.23	2.94	3.66	3.26	2.32	1.72
Ave. household income	\$14,227	\$20,713	\$26,052	\$28,169	\$23,504	\$12,628
Distribution of households	7.8%	23.3%	17.6%	15.4%	15.4%	20.5%
Distribution of income	5.3%	22.9%	21.7%	20.6%	17.2%	12.3%

Source: Consumer Research Center of the Conference Board.



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AT&T, ARA Services join as '84 Olympic sponsors

LOS ANGELES—The private group staging the 1984 Summer Olympics here has signed American Telephone & Telegraph and ARA Services as official sponsors of the games. The Los Angeles Olympic Organizing Committee said AT&T, besides being a corporate sponsor, also is sponsoring the Olympic Torch Relay, the ceremonial carrying of the Olympic flame from Athens to the games' opening. Philadelphia-based ARA Services takes the food management and transportation management corporate sponsor categories.

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Magazine readers per copy, Simmons vs. Mediamark

Greatest differences

Magazine	Simmons	Mediamark	% diff.
Saturday Evening Post	3.64	9.06	148.9
Runner's World	2.98	6.65	123.2
Sports Afield	6.56	13.8	110.4
Parents	2.41	4.97	106.2
Decorating & Craft Ideas	3.28	6.75	105.8
Working Woman	2.23	4.59	105.8

Smallest differences

Magazine	Simmons	Mediamark	% diff.
Star	3.06	3.00	2.0
The New Yorker	4.88	5.03	3.1
New York	2.72	2.82	3.7
Jet	9.04	8.49	6.1
U.S. News & World Report	4.39	4.73	7.7

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Reader numbers far apart

By STUART J. ELLIOTT

NEW YORK—You say *Sports Afield* has 6.56 readers per copy and I say it has 13.80 readers per copy. You say *Esquire* has a total audience of 2.3 million and I say it has a total audience of 4.4 million. Well, 6.56, 13.80, 2.3 million, 4.4 million...

Unlike the song, though, Simmons Market Research Bureau and Mediamark Research are not about to call the whole thing off. Until they do, magazine advertisers must continue to cope with what often are two widely divergent sets of data on readership and audience.

A comparison of the latest figures from SMRB (AA, Sept. 27) and Mediamark shows significant variation in many instances.

"There is a basic level of difference to be anticipated between Mediamark Research's data and ours," said Adam Richard, exec vp of SMRB here. The reason? The two companies have different methodologies: Through-the-book for SMRB and recent-reading for Mediamark.

By its nature, the recent-reading technique tends, in most cases, to produce higher readership scores. Of the 85 major magazines measured by SMRB and Mediamark, the latter shows more readers per copy for all but four of them (*The Star*, *Harper's Bazaar*, *Jet* and *Popular Hot Rodding*).

In some cases, the differences between the companies' data on readers per copy are chasm-size. SMRB says *The Saturday Evening Post* has 3.64 readers per copy. Mediamark puts the total at 9.06. In other instances, however, the differences are small (see chart).

There are major variations as well in most of the total audience numbers reported, at times upward of 100%. For example, regard these categories; SMRB figures are first, followed by Mediamark:

Women's books—*Better Homes and Gardens*, 21 million vs. 34.2 million; *Family Circle*, 18 million vs. 28.3 million; *Good Housekeeping*, 17.8 million vs. 28.7 million; *Ladies' Home Journal*, 14 million vs. 20.4 million; *McCall's*, 15.1 million vs. 22.2 million; *Redbook*, 8.7 million vs. 15.6 million; *Woman's Day*, 15.8 million vs. 25.8 million.

Mass circulation—*Reader's Digest*, 39.1 million vs. 54.3 million; *TV Guide*, 36.3 million vs. 47.2 million.

There is also little agreement on the largest gains and losses in readers per copy, in percentage terms, when comparing SMRB's list of 46 major magazines with the same titles as reported by Mediamark.

SMRB shows these five titles with the biggest gains: *Sport*, +20.2%; *Fortune*, +14.9%; *Ebony*, +8.7%; *National Enquirer*, +4.8%; and *Mechanix Illustrated*, +4.7%.

At Mediamark, the magazines showing the biggest gains are: *Organic Gardening*, +17.2%; *National Enquirer*, +11.1%; *Forbes*, +8.6%; *Star*, +6%, and *National Geographic*, +5.3%.

SMRB's five titles with the largest declines: *True Story*, -18.9%; *Parents*, -16.3%; *Vogue*, -15.3%; *The New Yorker*, -14.2%, and *Redbook*, -13.8%.

The five magazines with the largest declines at Mediamark: *True Story*, -29.6%; *The New Yorker*, -22.1%; *Popular Mechanics*, -16.7%; *Sunset*, -16.6%, and, tied, *Good Housekeeping* and *Seventeen*, -15%.

Advertising pages in October consumer publications

Current and October '81 figures for U.S., Canadian and foreign publications reporting to Advertising Age

	Pages					Pages					Pages								
	Oct. 1982	Oct. 1981	Jan. 1982	Jan. 1981		Oct. 1982	Oct. 1981	Jan. 1982	Jan. 1981		Oct. 1982	Oct. 1981	Jan. 1982	Jan. 1981					
Art & antiques																			
American Artist	155.9	199.6	1,444.5	1,557.8	Town & Country	203.5	215.0	1,306.9	1,273.8	Long Island Life	61.0	—	212.0	—					
Antiques	—	—	—	—	Travel/Holiday	42.9	45.6	451.5	464.4	Los Angeles	186.0	253.0	1,914.0	1,953.0					
Art & Antiques—(6X)	—	—	314.3	288.0	Travel & Leisure	134.8	—	889.2	931.3	Louisiana Life—(6X)	—	—	305.7	183.2					
Art in America—(11X)	100.5	133.3	985.0	921.4	Video	72.5	56.8	562.1	492.9	Madison	49.3	44.0	466.3	461.0					
Artnews—(10X)	85.4	121.4	812.2	990.1	Video Review	67.2	68.7	600.9	511.8	Miami	87.3	87.0	837.3	800.0					
Portfolio—(6X)	67.7	53.7	297.5	226.1	Writers Digest	22.5	25.7	218.8	215.7	Minneapolis	26.8	34.5	286.0	34.5					
Southwest Art	188.0	188.9	1,134.0	1,201.5	Yankee	134.3	142.8	810.0	853.3	Minneapolis/St. Paul	83.5	75.5	716.4	760.6					
Total Group	630.0	736.9	5,516.2	5,715.5	Total Group	2,007.1	2,903.5	15,357.6	16,067.8	Monthly Detroit	60.8	56.8	529.0	435.8					
% change	-14.5%	—	-3.4%	—	% change	-90.8%	—	-4.4%	—	Nashville	42.0	—	1,271.8	—					
Auto/cycle/rec. vehicles																			
Car & Driver	83.7	72.6	795.4	811.9	Home										New Jersey Monthly	61.0	71.3	549.9	630.3
Car Collector	—	—	—	—	Americana—(6X)	42.5	49.5	166.3	164.8	New Mexico	45.4	49.9	348.4	272.4					
Car Classics	24.7	26.8	223.7	241.5	Architectural Digest—A.	190.9	199.5	1,263.8	1,248.0	Ohio	32.7	25.4	389.5	314.7					
Car Craft	68.0	52.4	754.5	624.0	Better Homes & Gardens	134.6	159.6	1,101.8	1,170.2	Oregon	27.6	18.1	206.8	239.5					
Cycle	32.2	45.9	756.4	821.1	Colonial Homes—(6X)	86.0	105.5	321.8	315.5	Orlando	76.7	80.3	605.5	679.0					
Cycle Guide	21.2	35.1	524.3	567.5	Country Journal	63.5	68.3	451.4	448.7	Pacific Northwest—(10X)	26.7	28.3	250.3	130.9					
Cycle World	25.4	36.6	600.4	676.7	Country Living—E.	54.0	45.5	358.9	170.8	Palm Beach Life	47.3	48.0	661.4	708.7					
Dune Buggies & Hot VWs	59.6	42.8	553.1	420.3	Dallas/Fort Worth	72.3	64.2	561.3	432.7	Palm Springs Life	121.0	120.0	1,234.2	1,290.7					
Family Motor Coaching	87.5	52.7	957.7	613.8	Home & Garden	—	—	174.1	190.6	Philadelphia	169.1	157.5	1,251.3	1,377.4					
4 Wheel & Offroad	48.9	45.3	500.9	387.3	Early American Life—(6X)	—	—	193.2	203.0	Phoenix	78.4	85.2	778.8	869.4					
Four Wheeler	25.9	—	271.3	—	Family Food Garden—(6X)	35.0	34.0	193.2	203.0	Pittsburgh	61.6	54.1	479.4	412.2					
Hot Rod	50.5	39.1	578.1	522.4	Family Handyman—(10X)A.	76.4	69.6	574.0	490.8	St. Louis	58.0	90.0	633.2	720.3					
Motorcyclist	19.1	30.7	517.0	511.8	Flower & Garden—(6X)	33.5	32.7	226.8	215.5	San Diego	134.0	137.2	1,286.9	1,437.0					
Motor Trend	57.9	45.9	552.6	509.9	Handmade	—	—	77.6	45.0	San Francisco	66.2	73.5	507.3	615.6					
Motorhome—(9X)	—	—	568.6	387.4	Home	29.7	58.2	269.3	348.2	San Francisco Focus	44.8	43.6	364.7	358.6					
Pickup, Van & 4 WD	26.5	—	270.8	—	Homeowner's How To—(6X)	—	—	—	—	Shenandoah/Va.	—	—	190.1	101.0					
Road & Track	102.5	84.2	915.8	905.0	Horticulture	26.5	19.3	285.9	234.7	Tampa	31.5	42.4	314.6	282.7					
3 Wheeling—(11X)	25.3	29.2	222.4	141.2	House Beautiful	124.3	125.5	796.4	898.9	Tampa Bay	19.0	40.2	277.5	420.7					
Trailer Life	94.4	77.6	1,019.5	852.8	House & Garden	80.8	140.8	831.6	1,026.1	Texas Monthly	146.1	186.0	1,256.7	1,368.8					
Total Group	553.3	719.9	10,582.5	8,993.7	Houston Home & Garden	151.4	126.4	1,129.8	1,000.5	Twin Cities	47.9	63.4	456.9	497.1					
% change	+18.5%	—	+17.6%	—	Metropolitan Home	82.0	84.7	628.9	587.9	Washington Dossier	52.5	50.3	401.9	413.8					
Boating & yachting															Westchester Illustrated	139.0	166.0	1,333.0	1,302.9
Boating	115.1	104.6	1,093.2	1,112.4	New Shelter—(9X)	47.6	49.9	340.5	342.4	Total Group	4,119.0	4,341.0	36,201.7	36,367.3					
Chesapeake Bay	50.1	48.8	280.5	282.3	1001 Home—**	37.7	44.2	262.5	253.4	% change	-5.1%	—	+4.9%	—					
Cruising World	243.8	252.4	1,361.0	1,322.3	Organic Gardening	67.0	75.8	683.5	729.6	Movie/romance/radio/tv									
Lakeland Boating	—	—	—	—	Phoenix Home & Garden	62.5	61.0	484.5	370.5	Macfadden's Women's Group:	—	—	—	—					
Motor Boating & Sailing	107.7	112.2	1,264.8	1,295.5	San Diego Home & Garden	67.6	48.4	555.2	411.7	Modern Romances	32.8	25.1	288.6	277.0					
Rudder	17.6	19.1	216.6	241.1	Southern Accents—(4X)	—	—	238.1	241.3	Secrets	32.8	25.1	288.6	277.0					
Sail	126.7	152.3	1,400.9	1,443.2	Southern Living	125.2	140.2	1,208.6	1,186.8	True Confessions	33.0	25.4	301.3	291.7					
Sea & Pacific Clipper	68.2	73.8	734.9	803.6	Sunset Magazine—A.	169.5	173.9	1,336.2	1,359.8	True Experience	32.8	25.1	288.6	277.0					
Trailer Boats	17.5	14.3	231.4	240.9	Texas Homes	67.9	85.2	770.0	712.0	True Love	32.8	25.1	288.6	277.0					
Yachting	157.7	210.7	1,674.7	1,895.5	Workbench—(6X)	—	—	310.9	306.4	True Romance	32.8	25.1	288.6	277.0					
Total Group	904.4	988.2	8,258.0	8,636.8	Total Group	1,928.4	2,061.9	15,622.9	15,103.6	Sterling Women's Group:	—	—	—	—					
% change	-8.4%	—	-4.3%	—	% change	-6.4%	—	+3.7%	—	Daytime TV	30.3	30.2	304.4	315.7					
Canadian															Modern Screen	32.3	32.8	230.4	229.5
L'Actualite	75.2	84.7	518.4	537.7	Aboard Group—(7)—(4X)	42.3	38.8	154.7	146.3	Movie Mirror—(6X)	—	32.8	164.8	194.6					
Chateleine:	—	—	—	—	Air Cal	70.5	54.6	553.3	586.6	Photo Screen	—	32.8	130.1	158.4					
English Edition—A.	143.5	119.0	910.6	877.9	Alas/cafe	66.4	44.8	427.6	402.3	Soap Opera Stars	24.3	25.3	224.4	281.7					
French Edition	113.9	119.0	729.0	785.9	American Way	136.3	98.2	779.8	632.7	Spotlight	—	—	163.4	163.5					
Financial Post Magazine—A.	65.3	95.1	393.8	425.4	East/West Network:	—	—	—	—	TV Movie Screen	32.3	—	133.2	161.6					
Flare—A.	76.3	67.0	465.1	505.2	Amtrak Express	50.8	51.8	382.8	352.8	Teen Bag—(6X)	—	—	30.1	42.2					
Homemaker's Magazine	113.7	117.8	688.9	686.9	Continental Extra	60.7	67.7	536.6	514.5	Total Group	316.2	304.6	3,125.1	3,223.9					
Madam Au Foyer	72.5	94.0	511.5	523.1	Eastern Review	98.8	98.2	789.9	760.7	% change	+3.7%	—	-3.1%	—					
Maclean's—A.—(52X)	176.8	161.5	1,020.7	964.7	Ozark	48.2	57.0	415.3	451.0	Music/entertainment									
Perspectives—(52X)	30.6	59.7	315.5	395.5	PSA Magazine	96.0	113.2	832.7	877.0	American Film—(10X)	20.0	30.8	193.5	198.8					
Quest Magazine—(6X)—A.	64.2	62.0	343.6	341.3	Pan Am Clipper	39.8	64.0	388.3	580.4	Circus Magazine	29.3	40.6	298.5	215.5					
Reader's Digest:	—	—	—	—	Republic Scene	64.1	—	202.1	—	Dance Magazine	58.0	54.0	600.7	591.5					
Canadian-English—A.	101.6	109.9	786.4	859.7	Texas International/-	—	—	—	—	High Fidelity	48.3	50.3	331.4	409.6					
Canadian-French—A.	101.0	102.0	767.6	781.6	The Texas Flyer	72.3	75.7	631.8	580.0	Musicians	66.8	—	553.2	500.5					
Toronto Life	139.0	133.0	1,093.0	946.0	United	91.7	84.2	743.7	750.6	Playbill	71.0	78.5	529.1	527.5					
Total Group	1,273.6	1,324.7	8,554.1	8,612.9	USAir	66.5	55.7	467.2	477.1	Stereo Review	67.9	80.2	512.7	578.9					
% change	-3.8%	—	-0.6%	—	Western's World	59.2	—	182.3	—	Total Group	361.3	334.4	3,019.1	3,022.3					
Civic/fraternal															% change	+6.0%	—	-0.1%	—
American Legion	36.9	33.1	301.8	259.9	Delta Sky	103.3	51.0	534.8	453.5	Newspaper Sunday magazines/national									
Elks Magazine—(10X)	22.9	26.6	211.2	214.5	Skylite—(6X)	—	—	69.5	52.0	Family Weekly—A.	93.7	89.9	754.2	845.7					
Kiwanis Magazine	15.9	16.3	129.1	137.2	Hawaii	20.3	22.3	204.4	269.9	Parade	93.9	79.2	676.0	717.7					
Lion	7.6	7.0	63.8	51.6	Pace—(6X)	47.5	38.4	168.2	199.8	Total Group	187.6	169.1	1,430.2	1,563.4					
Moose Magazine	28.0	25.0	218.0	207.0	Spirit of Aloha	21.6	23.9	207.7	270.8	% change	+10.9%	—	-8.5%	—					
Rotarian	19.7	24.5	135.9	149.0	Southwest Airlines	111.9	93.5	957.0	650.6	Outdoor & sport									
V.F.W.—(10X)	33.3	33.3	254.0	249.8	Webb Publications:	—	—	—	—	Alaska	43.9	44.4	457.0	395.5					
Total Group	164.3	165.6	1,313.8	1,269.0	Frontier	43.7	38.5	388.0	353.5	American Handgunner—(6X)	31.4	46.2	183.5	202.3					
% change	-0.9%	—	+3.5%	—	Passages	36.7	42.7	293.6	31.0	American Hunter	29.3	29.2	178.4	143.8					
Comics																			

Advertising pages in October consumer publications

(Continued from Page 65)

	Pages			
	Oct. 1982	Oct. 1981	Jan. 1982	Jan. 1981
Tennis	50.1	46.4	671.2	661.7
Western Outdoors—(10X)	22.9	26.5	299.0	297.5
World Tennis	27.9	33.0	456.8	472.5
Total Group	1,741.1	1,624.5	15,160.8	14,314.5
% change	+7.1%			

Photography

American Photographer	55.5	56.8	477.0	415.5
Modern Photography	126.2	146.4	1,193.2	1,226.1
Petersen's Photographic	52.2	60.4	517.0	511.8
Popular Photography	123.9	146.3	1,278.0	1,385.8
Total Group	357.6	409.9	3,465.2	3,539.2
% change	-12.7%			

Religious

A.D. Magazine—(10X)	13.2	11.4	116.5	128.1
BBI Jewish Monthly—(10X)	24.4	23.4	205.3	191.3
Christian Herald	53.6	53.5	306.7	330.5
Christian Life	33.5	33.5	277.4	264.5
Christianity Today	94.7	90.3	633.8	680.1
Inside—(4X)	—	—	—	—
Moody Monthly	61.4	70.5	459.8	506.8
Total Group	260.8	282.6	1,999.5	2,081.3
% change	-0.6%			

Science/technology/-

September

	Pages			
	Sept. 1982	Sept. 1981	Sept. 1982	Sept. 1981
Atlanta Bus. Chronicle—(52X)	24.0	29.1	211.3	259.8
Barron's—(52X)	180.9	183.0	1,500.4	1,821.5
Black Enterprise	42.6	33.4	453.0	411.6
Business Week—(52X)A	356.3	377.9	3,159.7	3,387.3
California Business	107.9	115.4	664.0	654.1
Capital District	—	—	—	—
Business Review	48.0	27.0	284.0	230.0
CitiBusiness—(24X)	88.0	37.4	649.0	341.0
Corporate Report/Kansas City	53.1	55.1	473.4	434.7
Corporate Report/Minnesota	112.5	101.0	717.2	740.8
Crain's Chicago	—	—	—	—
Business—(52X)	115.7	103.9	919.3	778.6
Dallas/Ft. Worth Bus.—(52X)	42.9	56.3	356.2	395.4
Dun's Business Month	69.0	86.0	604.0	633.0
Financial World—(24X)	40.3	41.7	673.9	688.9
Florida Trend	51.0	75.6	602.2	593.2
Forbes—(26X)	263.9	273.4	2,019.0	1,930.4
Fortune—(26X)A	161.4	211.8	1,797.4	1,799.1
Hawaii Business	33.2	48.5	367.6	472.5
Houston Bus. Journal—(52X)	166.3	165.0	1,814.9	1,333.3
Inc. Magazine—A	91.9	117.0	720.3	729.6
Income Opportunities—(10X)	44.3	50.6	335.7	349.6
Industry Week—(26X)A	111.8	172.7	1,016.8	1,226.9
Indpls. Bus. Journal	66.3	60.0	602.3	464.6
Money	104.3	95.7	899.7	811.6
Nation's Business—A	38.6	40.8	320.7	362.3
New England Bus.—(20X)B	103.3	72.9	563.9	430.9
Pacific Business News	87.7	87.3	793.8	763.3
Pittsburgh Bus. Times—(52X)	53.8	29.0	387.7	35.4
St. Louis Business Journal	69.3	71.4	854.3	654.7
Texas Business	57.2	59.2	477.4	411.7
Venture	30.9	39.4	333.4	313.0
Total Group	2,858.6	2,899.5	23,364.5	23,259.2
% change	-1.4%			

Newspaper Sunday magazines/local

Arizona Republic	75.4	96.1	825.7	988.9
Boston Globe	199.3	177.2	1,474.5	1,465.3
Chicago Tribune	139.5	150.9	830.6	980.8
Cincinnati Enquirer	87.3	103.1	891.1	851.3
Cleveland Plain Dealer	78.3	97.1	677.1	687.1
Columbus Dispatch	35.0	85.7	472.9	749.4
Dallas Times Herald	52.7	91.7	651.1	757.3
Denver Post	115.9	213.0	1,074.4	1,641.8
Detroit News	79.5	112.1	782.7	1,070.5
L.A. Times Home Magazine	92.9	107.6	859.3	944.3
Louisville Courier-Journal	127.0	77.2	833.2	847.4
Miami Herald	57.5	87.0	546.2	738.4
New York News	65.2	109.6	476.1	831.9
New York Times Magazine	445.8	486.4	2,927.3	3,122.5
Philadelphia Inquirer	78.6	83.6	605.7	655.0
Toledo Blade Magazine	44.3	61.8	405.8	581.9
Washington Post	149.3	182.6	1,026.8	1,157.1
Total Group	1,923.5	2,302.7	15,181.7	18,200.9
% change	-16.4%			

Weeklies, bi-weeklies, semi-monthlies

The Advocate—(25X)	78.1	78.7	721.1	605.5
Army Times Military Group:	—	—	—	—
Air Force Times—(52X)	135.6	145.8	1,260.6	1,269.1
Army Times—(52X)	134.1	140.8	1,258.0	1,269.1
Navy Times—(52X)	155.6	163.6	1,495.8	1,481.0
The Times Magazine	25.4	25.0	136.5	162.2
Autoweek—(52X)	111.0	114.0	1,120.0	1,014.0
The Blood-Horse—(52X)	392.6	374.1	3,989.3	3,755.2
Capper's Weekly—(52X)	23.1	20.3	218.7	195.6
Commonweal—(22X)	4.4	9.4	67.0	65.2
Golf World—(43X)	69.4	55.2	662.6	653.8
Grit—(52X)A	27.5	19.4	235.0	201.1
National Review	34.6	24.2	236.5	230.4
New Republic—(52X)	30.2	21.5	258.5	180.7
New York Magazine—(50X)	218.5	187.7	1,688.8	1,524.1
New Yorker—(52X)	353.4	432.7	2,630.0	2,723.5
Newswatch—(52X)A	235.1	258.7	1,863.1	2,167.8
People—(52X)	273.6	270.4	2,418.7	2,446.8
Rolling Stone—(25X)***	138.9	92.5	790.7	705.6
Sporting News—(52X)	52.6	41.7	483.4	416.9
Sports Illustrated—(52X)A	280.2	215.9	1,894.8	1,986.1
Time—(52X)A	201.5	220.8	1,805.8	1,942.4
Traveler—(52X)C	2,532.0	1,997.5	22,893.8	16,814.1
TV Guide—(52X)A	356.5	306.5	2,570.1	2,528.6
Us Magazine—(26X)	47.1	26.7	442.1	306.5
U.S. News & World	—	—	—	—
Report—(52X)A	140.6	147.5	1,186.9	1,233.9
Total Group	6,030.6	5,391.1	52,149.8	45,896.4
% change	+11.8%			

mechanics/electronics

Creative Computing	196.0	137.7	1,248.8	1,032.2
Discover	36.7	38.6	329.7	297.2
High Technology	—	—	214.4	57.3
Mechanix Illustrated	75.1	17.0	656.8	663.4
Omni	65.6	92.5	565.6	547.8
Personal Computing	180.3	93.7	1,454.1	681.6
Popular Electronics	58.8	69.5	587.7	594.0
Popular Mechanics	119.5	122.5	1,011.9	1,047.9
Popular Science	106.8	97.0	816.3	755.0
Science Digest	29.5	31.8	284.5	266.3
Science 82	40.6	35.2	281.6	302.4
Scientific American	111.0	154.4	785.6	930.0
Technology Illustrated	69.2	36.4	284.0	36.4
Total Group	1,093.1	926.3	8,501.0	7,231.7
% change	+18.0%			

Women/fashion/service

Bride's Magazine—(6X)A	—	—	1,452.6	1,381.1
Co-ed—(10X)	44.3	41.5	285.9	295.7
Cosmopolitan—A	220.3	237.4	1,888.0	1,950.6
Essence	75.6	98.9	745.2	800.8
Family Circle—A	192.0	130.2	1,413.1	1,315.5
Glamour	172.6	186.3	1,593.2	1,745.0
Good Housekeeping—A	212.6	230.6	1,814.5	1,800.8
Harper's Bazaar—(10X)	115.6	117.9	1,111.6	1,029.2
Health	26.8	36.1	274.3	268.2
Ladies' Home Journal	93.4	97.7	742.6	838.5

Lady's Circle	12.4	8.5	98.5	47.5
Mademoiselle	150.8	145.8	1,280.9	1,258.4
McCall's	105.0	115.0	826.5	939.4
Modern Bride—(6X)	—	—	1,293.5	1,158.2
Ms.	40.3	48.8	472.0	397.2
New Woman	56.2	46.7	392.0	228.9
Parents Magazine—A	78.5	93.3	705.0	662.8
Playgirl	37.7	45.9	396.5	439.0
Redbook	101.4	101.9	875.2	945.4
Self	79.8	76.4	699.9	666.0
Seventeen	106.7	109.8	1,132.8	1,138.9
Soap Opera Digest	32.0	12.3	262.3	83.7
'Teen Magazine	41.3	47.6	470.1	463.6
True Story—A	80.2	64.3	595.4	551.1
Vogue	390.0	379.8	2,289.6	2,165.9
W Magazine	109.1	131.8	779.7	726.5
Weight Watchers	37.9	26.7	292.2	239.1
Woman's Day—A, D	202.2	124.3	1,215.4	1,158.9
The Workbasket—(10X)	42.4	53.7	334.9	333.6
Working Mother	82.6	87.0	574.3	445.8
Working Woman	91.5	75.2	784.0	600.7
Total Group	3,033.0	2,975.4	26,983.7	25,877.8
% change	+1.9%			

Youth

Boys' Life	23.6	25.2	199.8	218.0
Campus Life	89.3	81.6	388.1	365.3
Total Group	112.9	106.8	587.9	583.3
% change	+5.7%			

Foreign

Buenos Aires:	—	—	—	—
Central America	4.3	6.7	32.0	62.8
Chile	1.0	2.0	14.2	20.0
Colombia	77.3	75.0	480.8	449.7
Dominican Republic	12.7	10.3	123.3	102.8
Ecuador	14.2	12.2	102.7	82.7
Mexico	62.2	90.6	511.5	627.5
Peru	35.3	41.0	281.6	317.0
Puerto Rico	21.3	19.2	165.0	185.8
U.S.	7.0	9.7	63.0	71.5
Venezuela	33.7	39.2	316.7	357.5
Coqueto:	—	—	—	—
Central America	—	—	5.0	1.0
Colombia	4.5	2.5	38.5	21.0
Mexico	1.5	12.5	56.3	80.5
Peru	—	—	5.0	—
Puerto Rico	—	1.0	16.0	15.5
Venezuela	6.0	4.0	48.5	65.5
Fascination:	—	—	—	—
Central America	—	—	—	1.0
Colombia	9.0	9.0	77.3	77.7
Mexico	7.3	8.5	62.0	66.8
Puerto Rico	2.0	1.0	16.0	12.0
Venezuela	21.0	9.0	114.7	78.7
Geomundo:	—	—	—	—
Central America	8.0	5.0	53.0	42.3
Chile	9.0	6.0	59.0	51.8
Colombia	16.5	13.5	127.3	107.0
Ecuador	6.0	4.0	40.0	34.5
Mexico	13.0	25.0	113.7	142.5
Peru	10.5	12.0	78.5	89.5
Puerto Rico	7.0	5.0	81.0	42.3
Venezuela	18.0	14.5	143.8	109.3
Hombre De Mundo:	—	—	—	—
Central America	7.5	11.0	47.3	42.3
Chile	6.5	10.0	44.5	51.8
Colombia	15.2	23.7	117.5	107.0
Ecuador	5.5	12.0	39.3	34.5
Mexico	17.0	28.2	170.8	142.5
Peru	7.0	16.0	54.8	89.5
Puerto Rico	7.5	13.0	73.3	42.3
Venezuela	26.5	22.5	252.5	109.3
Ideas Para Su Hogar:	—	—	—	—
Central America	—	0.7	6.0	6.7
Chile	1.0	3.0	7.0	11.5
Colombia	50.0	34.8	277.2	228.8
Dominican Republic	—	0.5	3.0	15.0
Ecuador	8.3	3.2	67.7	16.7
Mexico	25.2	27.3	197.2	184.5
Peru	9.8	13.5	112.7	114.0
Puerto Rico	0.3	2.3	16.5	26.3
Venezuela	26.0	20.0	216.7	152.0
Intimidades:	—	—	—	—
Central America	3.0	2.0	15.0	16.0
Chile	1.5	—	4.5	2.0
Colombia	3.0	2.0	15.0	16.5
Mexico	5.0	6.0	43.0	50.0
Puerto Rico	4.0	3.0	25.0	28.5

**OCT
18
1982**

Market/Advertising Research



Richard Edel

Agency's seek and research mission

By Jack J. Honomichl

In 1879, N.W. Ayer & Son, the famous advertising agency

Jack J. Honomichl writes a regular column on marketing research in ADVERTISING AGE and helps coordinate Magazine research reports.

then based in Philadelphia, was soliciting a new account, Nichols-Shepard Co., a manufacturer of agricultural machinery. Ayer prepared a media schedule that was challenged by the would-be client, according to L. C. Lockley, writing in "The Journal of Marketing" (April, 1950). Substantiation came from

an Ayer survey of state officials and publishers throughout the country asking for information on grain production and media circulation by counties. The client was impressed, and Ayer got the account.

In that respect, at least, things haven't changed much over the

past 103 years. When agencies pitch new business, the presentation is often larded with information about the would-be client's marketing problems. But now a large, inhouse staff of professional researchers is usually available to gather up the sales ammunition. "We usually end up setting the tone for the whole presentation," says one agency research director, "because we're the ones who have the facts."

Young & Rubicam claims to

have started the first formal agency research department in 1929, when a well known statistical professor from Indiana, George H. Gallup Sr., came to New York at the behest of Ray Rubicam to start a department.

Y&R's claim may be disputed, but there is no doubt that research—advertising, media and marketing—has been an integral part of U.S. advertising agencies' service capabilities for a long, long time. The roots are deep.

But, currently, there may well
(Continued on Page M-10)

Research mission

(Continued from Page M-9)

be what one research director termed "an identity crisis," with some agency research department heads casting about for new and more important ways to serve their constituencies and a clear-cut "mission." This has been induced, in part, by the growing sophistication of their clients' research departments; clients aren't so dependent on agency research backup as they once were. In short, it's gotten much more difficult to snow a client with research.

Also, one of the most sensitive areas of research, testing of tv copy and advertising effectiveness in general, has been under heavy attack, and the implication is that an agency's research staff should somehow alleviate the problem, which continues to fester.

In any case, advertising agencies today fund a sizable segment of the U.S. research industry. For instance, according to recent data compiled by Advertising Age Magazine, the 25 largest

est agencies (in terms of gross income derived from U.S. operations alone in 1981) now have 1,550 employees working directly in research, of whom 1,162 are considered professionals.

This count does not include about 200 other employees who work in agency libraries or "information centers" as backup to the research staffs. Neither does it take into account the hordes of parttime employees and consultants hired by the agency. So, looking at just the 25 largest U.S. agencies, they collectively employ 5.4 professional researchers per \$10 million of gross income.

But the disparity among the 24 largest U.S. agencies in terms of their apparent emphasis on the research function is surprisingly high (see chart). The number of research professionals employed per \$10 million in income ranges from a high of 9.0 (Needham, Harper & Steers) to a low of 2.6 (Ogilvy & Mather).

This same variance shows in

the percentage of the total agency's payroll going to research staffers. Among U.S. agencies with \$13.5 million in gross income or more, the mean is close to 4%. But the range is from a high of more than 7% in one agency to a low of less than 1% in another. Such a swing can't be explained away by caliber of staffs or salary levels; it simply demonstrates that some agencies place much more emphasis than others on the research function and that aspect of service to clients. That is also true when it comes to expenditures for research and development, agency support for broad-based original research that might prove useful to all clients, as well as the advertising community in general.

Beyond various dimensions of size, it turns out that there are other significant differences among major agency research operations. For instance, in some agencies almost all the top research personnel are female; in others, the opposite is true. In some agencies, there is a titular head of research operations, a prominent front man (or

woman) who has a grandiose title (but not necessarily much line authority); in other agency setups, the research staffs scattered around in branch offices and subsidiaries are, for all practical purposes, autonomous.

Some agencies have through the years built up internal data collection capabilities—focus group facilities, WATS phone centers or mall locations for central interviewing—while others farm out almost all their work. Other agency research departments stress their role in helping to make good, effective advertising; in others, the emphasis is on the planning of marketing strategy. Some agencies have a monolithic, highly structured point of view towards some research methodologies (for instance, one tv copy testing service vs. another); in other agencies that does not exist.

In short, these agency research organizations are not nearly as homogeneous as one might expect, and the differences transcend those that might be expected because of their particular client base.

For example—and not surprisingly—agencies seem to tend to see the research services they offer to clients as being well received and valuable, but the client's evaluation is not necessarily as rosy. Evidence of this comes from an ADVERTISING AGE Sounding Board survey conducted in January, 1979, and reported in the Feb. 12 issue of that year. These data are based on a survey of more than 100 marketing and advertising executives on the client side and top agency executives.

When asked how clients feel about the importance of agency services, the results showed that from the client's point of view advertising research is important—with 50% saying they consider it "very important." The importance of marketing research, relatively, is much less—with 25% considering it "very important" and 54% saying it's "of less importance."

But, in terms of evaluating how agencies deliver on client expectations, a definite gap exists. From the agency point of view, 23% say clients are "extremely satisfied" with agency contributions to advertising research, and none say clients are "unsatisfied." The client point of view, in sharp contrast, shows that only 4% say they are "extremely satisfied," and 23% are "unsatisfied."

This is not to say that down deep top executives of major agencies do not recognize this gap and feel it is important enough to take action. It is interesting to note that since 1979, two major agencies—Young & Rubicam and Ted Bates—have brought in new top research management, replaced to a large extent almost all their research professionals, greatly expanded their research staffs and started to invest in R&D.

Beyond these conspicuous cases, there appears to be a considerable amount of shuffling around at major agencies in response to current criticism and pressure. Here are some examples:

• Leo Burnett USA, as part of a reorganization in mid-1980, moved senior research staff members physically into the creative department to promote day-to-day cooperation and rapport. The results have been very positive, says Calvin W. Gage, Burnett's research director. At Y&B's New York office, senior researchers have been assigned to creative group heads, although they haven't physically moved their offices.

• Almost all major agencies now emphasize "life style" research, a continuous monitoring of societal changes and shifts in attitudes and purchasing behavior, to give their agency and clients an early warning system on the future—and, presumably, to give their research departments a futuristic image. One researcher, who headed a large agency research department in New York, sees this emphasis on "macro" research—the "big picture"—as a way to compensate for the declining interest clients are displaying toward workaday research from their agencies. And it's good publicity for the agency too.

• Many of the large agencies are starting to play up "strategic planning" in both job titles and operative roles. Presumably this stance—in part semantic manipulation—adds prestige and luster beyond what can be obtained via research alone. (This has been going on in British agencies for some time. According to certain agency officials, it's tough to find a "researcher" in London agencies these days; the term now is "strategic planner.")

• A growing response to criticisms about traditional copy testing is evident too. One conspicuous illustration is the funding by Foote, Cone & Belding (AA, May 11) of a new, on-air tv commercial testing procedure it believed was most suitable for evaluating the impact of highly emotional copy treatments, with emphasis on nonverbal communications, rather than the traditional day-after-recall techniques, which tend to place most emphasis on a respondent's ability to feed back—that is, verbalize—key copy points, or a selling proposition. In an unprecedented move, FC&B executives put together a road show and made public presentations of the findings to meetings of advertising executives in several major cities.

Another illustration is the APACT report, supported by a group of 20 or so major agencies, which attempts to publicize a standard point of view regarding tv copy testing procedures, which—ideally—would influence all agencies and their clients and settle some dust.

Quite independent of how large agencies shift and mold their research operations in the future to position them in a changing climate, the fact remains that they have been, and continue to be, a large and important part of the U.S. research industry.

Beginning on the opposite page are profiles of the 10 largest agency research operations. The scope of their operations speaks for itself.

How clients feel about the importance of agency services

	Absolutely necessary	Very important	Of less importance	Not very important	NA
Advertising research	23%	50%	23%	2%	2% = 100%
Marketing research	4	25	54	10	7 = 100
Marketing strategy and plans	6	52	35	2	5 = 100

Client degree of satisfaction with agency's performance

	Extremely satisfied	Satisfied	Unsatisfied	Don't use	NA
Advertising research	4%	54%	23%	8%	11% = 100%
Marketing research	4	35	13	33	15 = 100
Marketing strategy and plans	4	60	13	15	8 = 100

Agencies perceptions of client's satisfaction with agency's performance

	Extremely satisfied	Satisfied	Unsatisfied	Don't use/offer	NA
Advertising research	23%	68%	—	—	8% = 100%
Marketing research	11	54	—	3	14 = 100
Marketing strategy and plans	4	61	—	3	100

Source: ADVERTISING AGE Sounding Board survey, January, 1979

Who's who in advertising research?

The 10 largest agency research operations queue up

The following is a comprehensive listing of the 10 largest advertising agency research operations compiled by Advertising Age Magazine.

BBDO, New York, while ranking fifth among U.S. agencies in gross income (\$127.9 million in 1981), ranks first in emphasis on research in many respects.

The parent plus a passel of subsidiaries, including the recently acquired Tracy-Locke, employ 143 people in research, 106 of whom are professionals. (These numbers do not include seven employees in the information resource center, which is touted as "the most extensive collection of secondary research resources in the business.") Of the professionals, 96 are in marketing/advertising research, and 10 are in media research.

This translates into 8.3 professionals per \$10 million in gross income, far above the industry average of 5.4.

In terms of the percentage of its gross income spent on re-

search operations, BBDO is believed to have one of the largest, if not the largest, of all large U.S. agencies.



Pringle
BBDO

At BBDO there is the traditional research group, headed by either a research director or an associate research director, assigned to each account.

The senior research person

also is a member of a brand planning group, which includes a top-notch individual from creative, account management, media and senior management; this group, which overlaps the traditional agency account structure, has major coordinating responsibility for a given brand.

BBDO

In addition, at BBDO in New York, there is a marketing sciences group of 25 people, headed by R. Dale Wilson, responsible for marketing model development, computer operations and new product forecasting and analysis.

A third group, marketing horizons, is responsible for monitoring changing life style trends and "futures research." A fourth group, special projects, is charged with the development and improvement of techniques used by BBDO research, broad-scale consumer attitude and life

style research, and BBDO position papers on research questions.

Inhouse facilities include "hotline," a 10-station WATS phone facility in the New York office, as well as "ad-lab," a focus group facility.

With regard to hiring research staff, an agency statement says, "We value integrity and the kind of personal strength that makes integrity possible. We value hard-working people, people who love advertising and the challenge it offers. We value intellect and creativity and find it difficult to distinguish between the two." BBDO does some recruiting directly from graduate schools. Transfer from research into other agency functions is discouraged.

Lewis G. Pringle, 41, is executive vp-director of research services at BBDO. He joined the agency in 1968 and was elected to the board in 1978. Mr. Pringle is a graduate of Harvard University and received his Ph.D. from the Massachusetts Institute of Technology.

research director. Further, the professional staff today, with a couple of exceptions, is new to Bates since 1980.

As for philosophy, the new stance goes like this: "The mission of Bates research is implicit in the agency's philosophy and discipline, the USP (unique selling proposition). Explicitly, our goal is to help get better copy quicker."

Bates research in New York is divided into four operating units: (1) four professional groups, each headed by a vp-research director, which have client assignments; (2) the marketing sciences and services group, overseeing research development activities and liaison with the academic research community; (3) research operations group, responsible for the fielding of research studies, coding and tabulating; and (4) the information services group, which has direct computer access to more than 50 major databases.

In addition to the line organization, the Bates department is simultaneously organized into five specialized task forces ("probably a misapplication of matrix management," according to Mr. Fiedler): Motivation research group, headed by Rudy Schroer and Jack Bookbinder; test marketing experimental design group, headed by Paul Keller; copy research group, headed by Sheri Nadel; and market structure and segmentation research group, headed by David Gantman.

The Bates department periodically issues a report, "New Product Scan," which monitors all new products in test market and national launch. It has worked closely with Stanford Research in the design and execution of their values and life styles research program.

In addition, the agency has worked with the music and marketing departments of Columbia University on studies regarding the effect of music in advertising.

Also, in conjunction with State University of New York, Purchase, Bates has begun experimental research in the area of psychophysics (brainwave activities).

Mr. Fiedler, 40, received his MBA degree from the University of Chicago and is a member of the Bates board.

Ted Bates Worldwide, New York, was the fourth largest U.S. agency in 1981, with a gross income of \$129.1 million (excluding William Esty Co., a recent acquisition).



Fiedler
Ted Bates

Bates has seven subsidiaries, most notably Campbell-Mithun and Esty.

In all, these eight organizations employ 99 people in research, 79 of whom are professionals. (About one-half of this staff is with Bates in New York.)

For all Bates properties, this

Ted Bates

works out to 4.0 professionals per \$10 million in income. However, the calculation for Bates/NY alone is 6.5, and for all the other properties combined 2.9.

(These counts do not include nine librarians employed by these agencies).

As for Bates/NY, the research staff is 2½ times as large today as it was in 1980, when John A. Fiedler came from Leo Burnett USA to be senior vp-executive

Leo Burnett USA, Chicago, is the largest agency in Chicago and the sixth largest in the U.S., with a gross income of \$124 million in 1981, can lay claim to the largest agency research staff under one roof—136, of whom 100 are professionals.

(This figure does not include three librarians or about 54 parttimers associated with the department.)

That works out to 8.1 professionals per \$10 million gross income, the third highest among

(Continued on Page M-18)

Researchers in advertising agencies

How 24 large U.S. advertising agencies rank:
The number of research professionals employed
per \$10 million in gross income (U.S. only)

	Total number professionals employed	Number of professionals per \$10 million income
1. Needham, Harper & Steers	53	9.0
2. BBDO	106	8.3
3. Leo Burnett	100	8.1
4. Foote, Cone & Belding	79	6.8
5. Ted Bates/New York	40	6.5
6. D'Arcy-MacManus & Masius	47	6.4
7. Young & Rubicam (excluding Marsteller Inc.)	106	6.1
8. Kenyon & Eckhardt	29	6.0
9. Dancer Fitzgerald Sample	41	5.4
10. Cunningham & Walsh	20	5.4
11. Doyle Dane Bernbach	62	5.4
12. J. Walter Thompson USA	83	5.4
13. SSCB/New York	22	5.3
14. Benton & Bowles	43	5.3
15. Marschalk Campbell-Ewald	34	5.2
16. N W Ayer	35	5.1
17. Grey Advertising	47	5.0
18. Ketchum Communications	17	4.4
19. McCann-Erickson	30	4.0
20. Bozell & Jacobs	23	3.7
21. Marsteller Inc.	16	3.2
22. Wells, Rich, Greene	20	3.1
23. Subsidiary companies of Ted Bates & Co., combined—most notably William Esty Co.	39	2.9
24. Ogilvy & Mather	41	2.6

*This analysis was based on gross agency income, U.S. only, for the year 1981, as reported in the ADVERTISING AGE, 1982 edition, U.S. Agency Income Profiles. The research staff counts were furnished directly to the author. The analysis is complicated by the number of subsidiaries included in some agency totals, and for the 10 largest agency profiles, this is explained. When possible, data on some of the largest subsidiary agencies are shown separately. Compton Advertising, which is one of the 25 largest agencies, would not contribute to the summary.

Advertising agencies

(Continued from Page M-11)
major agencies.

The Burnett operation is distinctive in other respects. For example, since mid-year 1981, researchers assigned to creative actually have offices in the creative department to promote close, day-to-day cooperation and report.

Also, Burnett pioneered, 25 years ago, the use of central location interviewing. (Today, the

Burnett facility is located near Woodfield Mall, a giant shopping center in a Chicago suburb. A focus group facility is in the agency's main office in Chicago's Loop area.)

According to an agency official, "Virtually all of our research is conducted inhouse, except for field work done outside Chicago."

A Burnett life style program, started in 1967, monitors soci-



etal changes and their relevance to advertising problems.

"While we deal with a great range and variety of research," says an official, "five areas account for the majority of our

projects: Focus group discussions, copy research, life styles analysis, the planning evaluation of new product introductory programs and experimental work to improve our understanding of how advertising works—and to find better tools for studying the ways people are affected by advertising."

Organizationally, Burnett assigns each account a research group headed by a vp-group research director (who is physically located in the creative department), who is backed up by



Gage
Leo Burnett

associates and analysts.

In addition, there are four groups of specialists: (1) qualitative research (focus groups, depth interviews); (2) new product research (tracking studies, study of new product introductory copy); (3) consumer and marketing research programs (life style program and the modeling of relationships between advertising and sales/purchase behavior); and (4) copy development research (r&d on copy testing procedures).

Burnett research recruits staff from universities. Also, the agency's client service department, as part of its training program, puts recruits into research for a year or so.

The head of Burnett research is Calvin W. Gage, 51, senior vp-director of research, who joined the agency in 1955. He has a master's degree in American studies from the University of Minnesota.

D'Arcy-MacManus & Masius, New York, has research departments in each of its seven U.S. offices, and they employ 70 people, 47 whom are professionals.



Because DM&M gross income for the U.S. in 1981 was \$73.9 million, this works out to 6.4 professionals per \$10 million in income, well above the industry average of 5.4 for large agencies. (DM&M owns a research company, Mid-America Research in Mount Prospect, Ill., which specializes in central location interviewing through four mall sites. Mid-America staff is not included in this analysis.)

Each of the DM&M research staffs operates autonomously, and there is no one person within the DM&M organization who is the titular head of research.

However, the research directors from these seven locations are members of DM&M's research operating committee, which meets quarterly to ex-

(Continued on Page M-20)

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Advertising agencies

(Continued from Page M-18)
change ideas and consult on problems of common interest.

DM&M, not surprisingly, finds virtue in the decentralization of research, namely that each office tends to have a different type of client base—package goods, durables, industrial—and hence each can adjust accordingly.

DM&M's operating philosophy stresses "upfront research—used developmentally—on behalf of all clients—as the most effective and efficient deployment of resources," according to an agency official.

The DM&M units do share a central information services de-

partment—including a central library (librarians are not included in the staff counts above), and there is information retrieval through crt's.

Also, a "New Products Prediction Model" called RAM, which was developed by DM&M/Chicago, is available to DM&M clients. Two of the DM&M offices have life style researchers and there are arrangements with several universities as consultants in special areas, including statistics, psychology and sociology.

DM&M research directors are: Tom Kutsko, Atlanta; Lucien DiSalvo, Bloomfield Hills, Mich.; Marshall Ottenfeld, Chicago; George Scott, Minneapolis;



Ziff
Doyle Dane Bernbach

Patricia Greenwald, New York; and Philip Baker, St. Louis.

(The San Francisco post is open.)

Doyle Dane Bernbach, New York, comprising



eight different operating groups in the U.S., had a gross income of \$115 million from U.S. operations in 1981, ranking it eighth in size among agencies.

There are 82 people (mostly headquartered in New York) working in research—71 in advertising and marketing research, 11 in media research.

Of these, 62 are professionals, or 5.4 per \$10 million in income.

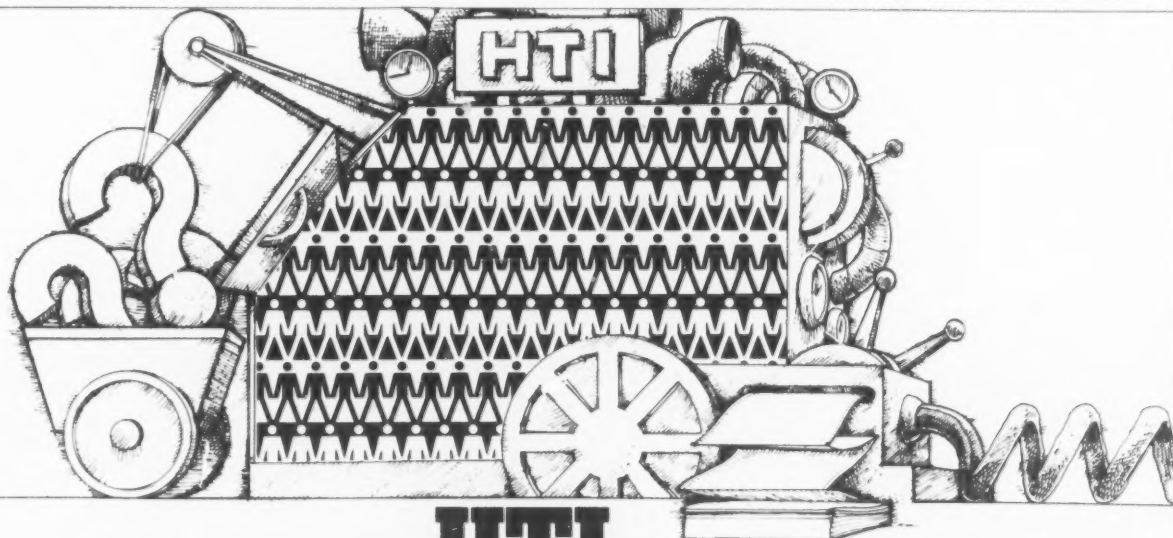
(This does not include eight staff members in the agency's research library, which features on-line terminal access to various databanks.) This staff is organized into two groups, with one reporting to a vp-manager of research (Sy Collins), and the other reporting to a vp-manager of marketing services.

Under research, there are six group research directors, each a vp, and each of them has a staff of professionals with titles such as associate group director-research supervisor. Each group has a list of client assignments, except for one that specializes in international research and special agency projects. (Some members of the marketing services staff are involved in secondary research, and these are included in the counts above.)

In addition to conducting day-to-day studies—from brand image to media mix and weight studies, from legal support to product test and a variety of copy development tests in conjunction with DDB's creative staff—the DDB research group has developed several techniques it believes are innovative.

They include METER, a tv pretesting technique called multiple exposure television effectiveness research; CON-TEST, a system to test alternative advertising strategies; GOALS, a five step systematic, disciplined approach to the generation of advertising leverage strategies, and two unique systems for measuring the intrusiveness of radio commercials and the readership of print ads (which includes a mock newspaper where test ads can be tipped in).

The top research executive at DDB is Ruth Ziff, executive vp and director-research & marketing services. Before joining DDB in 1979, she was vp-manager of research at Benton & Bowles. Ms. Ziff is a member of the agency's management review board and a director of DDB. She received a Ph.D. in sociology from the City College of New York and, in 1973, was named



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Foote, Cone & Belding, Chicago, has six research units: FCB/Chicago; FCB/New York; FCB/Honig, San Fran-

pany, JWT Group, which includes, among other properties, Hill & Knowlton, the world's largest public relations agency, which has a sizable research department of its own, and Simmons Market Research Bureau, the staffs of which are not included in this analysis.)

JWT/USA employs 106 people in research in six offices; 83 of these are professionals, so that works out to 5.4 professionals per \$10 million in gross income, average for the large agencies. "The research operation at JWT, as the name research and planning signifies, goes well beyond data collection," says an agency official.

"It is functionally integrated into the agency's target planning system. Department professionals work with the account team on a continuing basis in the planning, development, execution and evaluation stages of marketing and communications strategies for our clients."

Researchers are organized according to account groups, with client assignments, and the lead researcher is a member of the agency's target planning team.

JWT says its commitment to research "is mostly strongly demonstrated through its long-standing investment in a continuing r&d program." As examples of this, JWT cites the following: A study of the public's perception of television violence and its effects upon the performance of advertising; a "new demographics" for defining the changing role of women and responses to traditional and contemporary portrayals of women in advertising; tracking studies of consumer responsiveness to generic products, and a study of the potential value of long-form commercials available upon demand via "Cablesnap." In addition to account group assignees, JWT research staffers are organized into groups of functional expertise: Media research, statistical analysis, sampling, marketing models, forecasting, information retrieval. Some consultants are used on an as-needed basis.

JWT has semiannual, two-day seminars, which are attended by the senior research professionals from its U.S. offices as well as its affiliated U.S. and Canadian operations to share research expertise and ideas.

Sonia Yuspeh, who joined JWT in 1972, is senior vp in charge of research and planning. In 1982 she was appointed chairwoman of the agency's U.S. research and development committee. She also chairs the New York office Strategy Plans board. Ms. Yuspeh has a master's degree in sociology from Cornell University.

Young & Rubicam, New York, the largest agency in terms of U.S. gross income (\$222.8 million in 1981), is—along with a group of branch offices and wholly owned subsidiaries, including Marsteller, Inc.—the largest employer of research personnel: A total of 136, of whom 122 are professionals. (This number does not include a library staff, business managers and clerical support staff; under the Y&R organization in New York, secretaries are on another



Plummer
Young & Rubicam

budget.) This works out to an average of 5.5 professionals per

\$10 million in gross income. However, for Y&R properties excluding Marsteller, it is 6.1; for Marsteller alone, it is 3.2.

It wasn't always this way. Since Joseph T. Plummer came from Leo Burnett Co. to be executive vp-director of research at Y&R/USA in 1979, the Y&R re-

YOUNG & RUBICAM

search staff has nearly tripled in size. Also there has been a greater investment in basic r&d plus a reorganization that emphasizes close working relationships with creatives. (A researcher is assigned personally to each senior creative chief.) The research emphasis, according to an agency statement, has shifted from "How did we do?"

to "Are we touching the consumer?"

"This shift from 'counting noses' after the fact to 'sticking our necks out' upfront has had an important impact on creative strategy, creative development and agency new business efforts," says a Y&R official.

The Y&R research department was founded by George H. Gallup in 1929, and that, says Y&R, makes it the oldest agency research group in the U.S. Today, the organization includes the traditional account research groups (seven) assigned to clients. This staff is headed by John Eighmey.

In addition, there is a consumer research services group, under the direction of Max Bonfield, which works in the area of

copy testing, survey design, modeling and computer application and consumer values/life style research. Also, a group called creative research services, headed by Susan Gianinno, works on creative problems and manages the discussion lab, an inhouse focus group facility.

Paul Murphy is director of research for all Y&R specialty companies (excluding Marsteller Inc., whose research head is John H. Morris), who can turn to Y&R/USA staff for "additional horsepower" on research projects, as required.

Mr. Plummer, 41, an executive vp of Y&R/USA, is also a member of the board. He received his Ph.D. in communications from Ohio State University.

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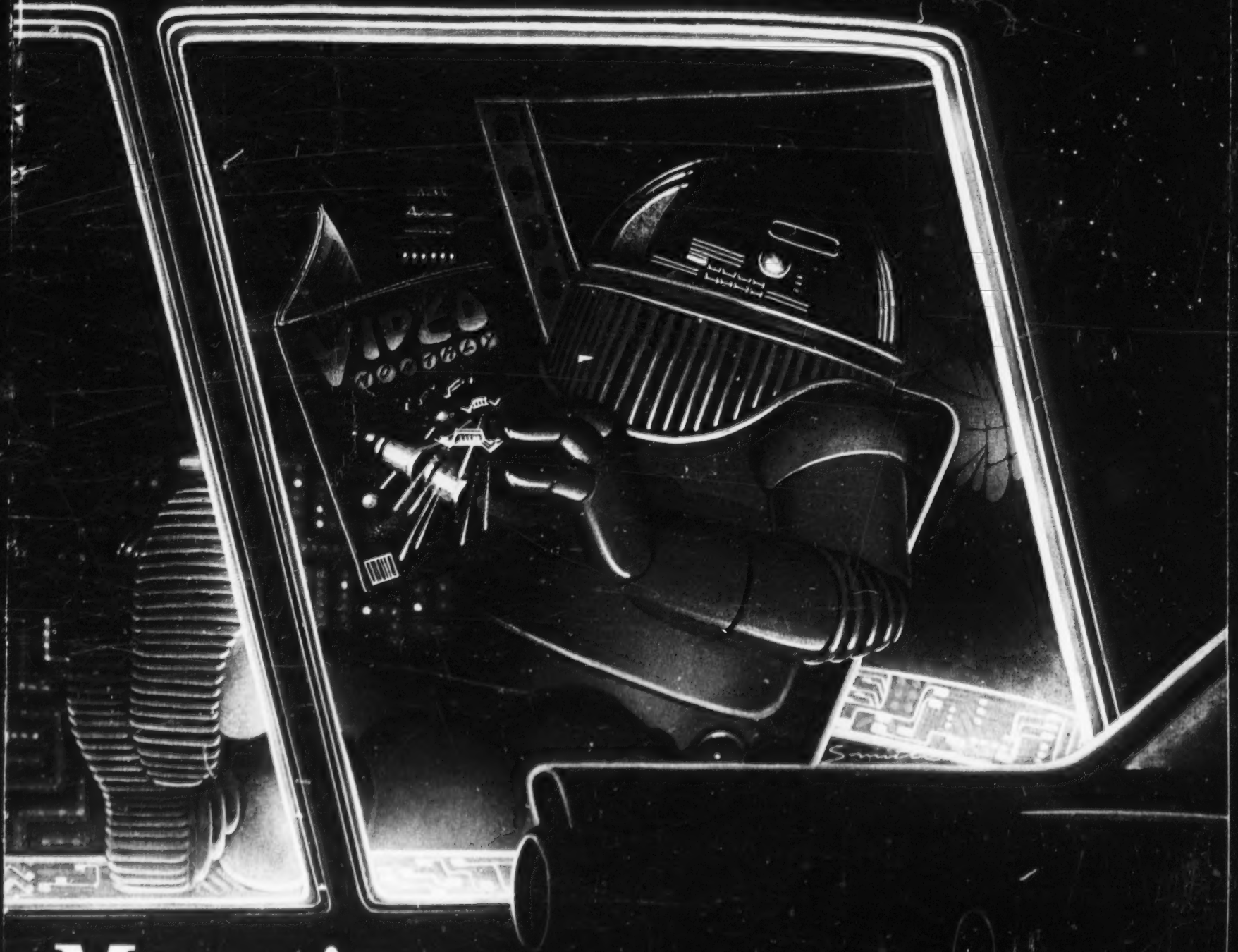
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